infoAdvantage - WebIntelligence

For Functional Users

Presented by CGI-AMS

July 19, 2005

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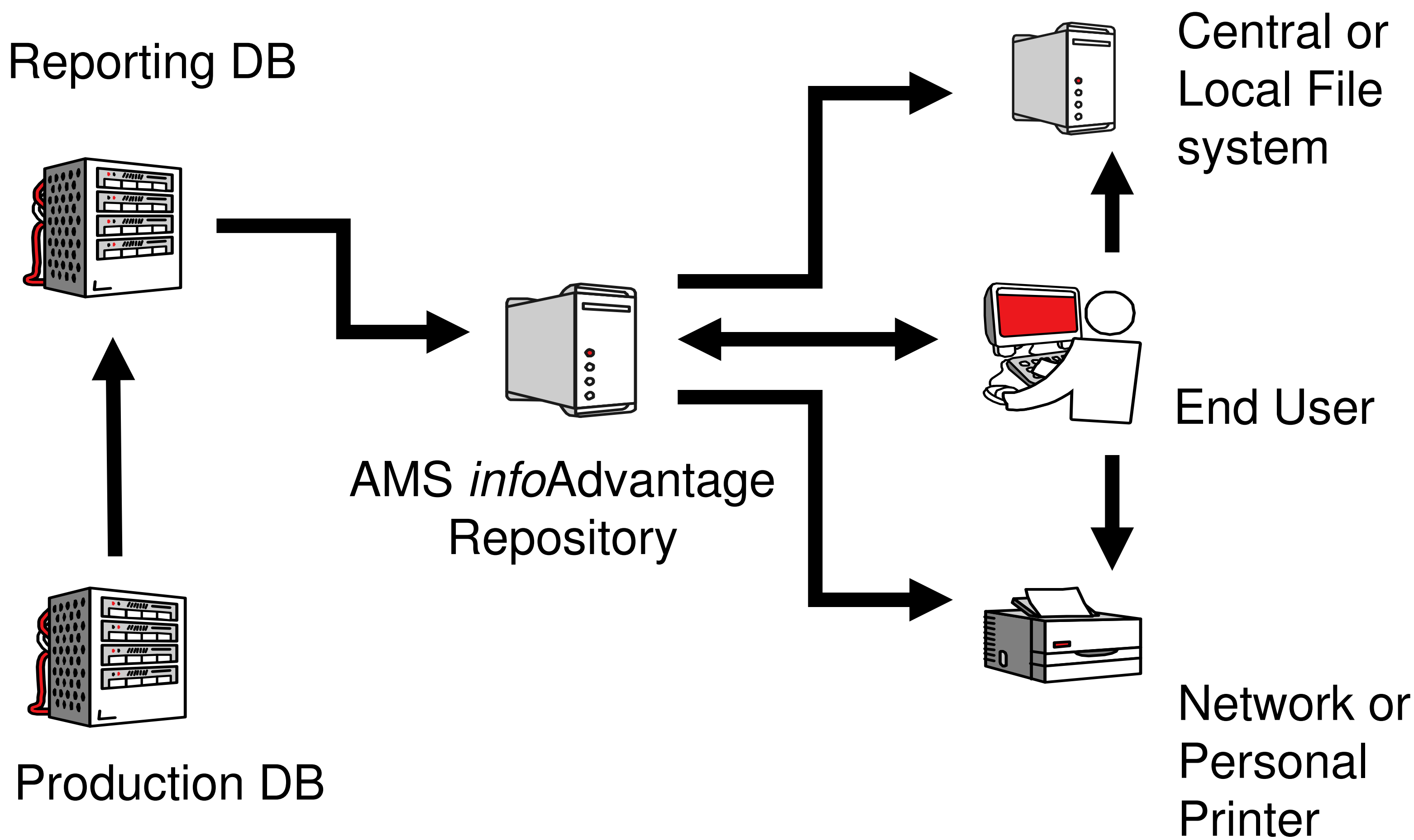
Agenda

- Introduction to AMS *info*Advantage
  - Terminology/Applications
- Introduction to WebIntelligence
  - Terminology
  - Login and basic navigation
  - myInfoView
  - Features
- Refresh & Download Reports
- Report Creation/Modification
  - Report Lay Out
  - Save & Share information

1: AMS infoAdvantage An Introduction

- READ-ONLY: never updates the database
- To create and run simple and complex queries
- Flexible report lay out
  - slice and dice, breaks, sorts, calculations
  - logos, cross tabs and charts
- Combine detail/summary information in one report
- Use any field in the Reporting Database to query or filter on

AMS infoAdvantage Technical Framework



AMS infoAdvantage Terminology

Repository:

Central storage area for

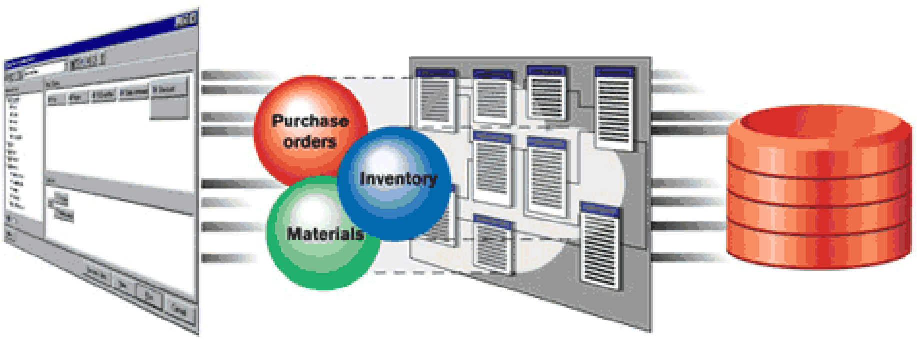
- Reports (Published or Personal)
- Universes
- Security Set Up
- Broadcast Agent (scheduler) information

Universe:

- Meta layer presents information
- Business oriented view of data
- “English”-like presentation eases report creation
- Database complexities (e.g., database table joins) hidden from report authors

Document:

- File that contains one or more reports
- Shared/Corporate: published report, accessible by all users
- Personal: user’s saved report, not shared



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AMS infoAdvantage Terminology – 2

- Shared Documents
  - Standard Reports
  - Published reports accessible by other users
- Personal Documents
  - Documents saved by user
  - Not shared
  - Only user can see/use
- Inbox Documents
  - Documents directly received from other users or scheduler

AMS infoAdvantage Applications

- Supervisor
  - Set up Security and Access Rights
  - Monitor the applications
- Designer
  - Create/Maintain Universes
    - Universe: Grouping of tables. Defines what fields can be used in reports
- Business Objects Reports viewer/creator:
  - 'Thick Client'
  - Create/Run/Schedule complex reports
- WebIntelligence:
  - 'Thin Client' or WebI
  - Retrieve/Run/Schedule any kind of report ('Thick' and 'Thin')
  - Create less complex reports

2: WebIntelligence – An Introduction

- Also called: WebI and ‘Thin’ client
- Access through Web Browser
  - No software install needed
- For Functional End Users & Technical Users
- Four components in training:

a) Navigation
   i. Page layout
   ii. Share information

b) Work with standard or existing reports
   Run/Refresh/Download reports

c) Create new reports

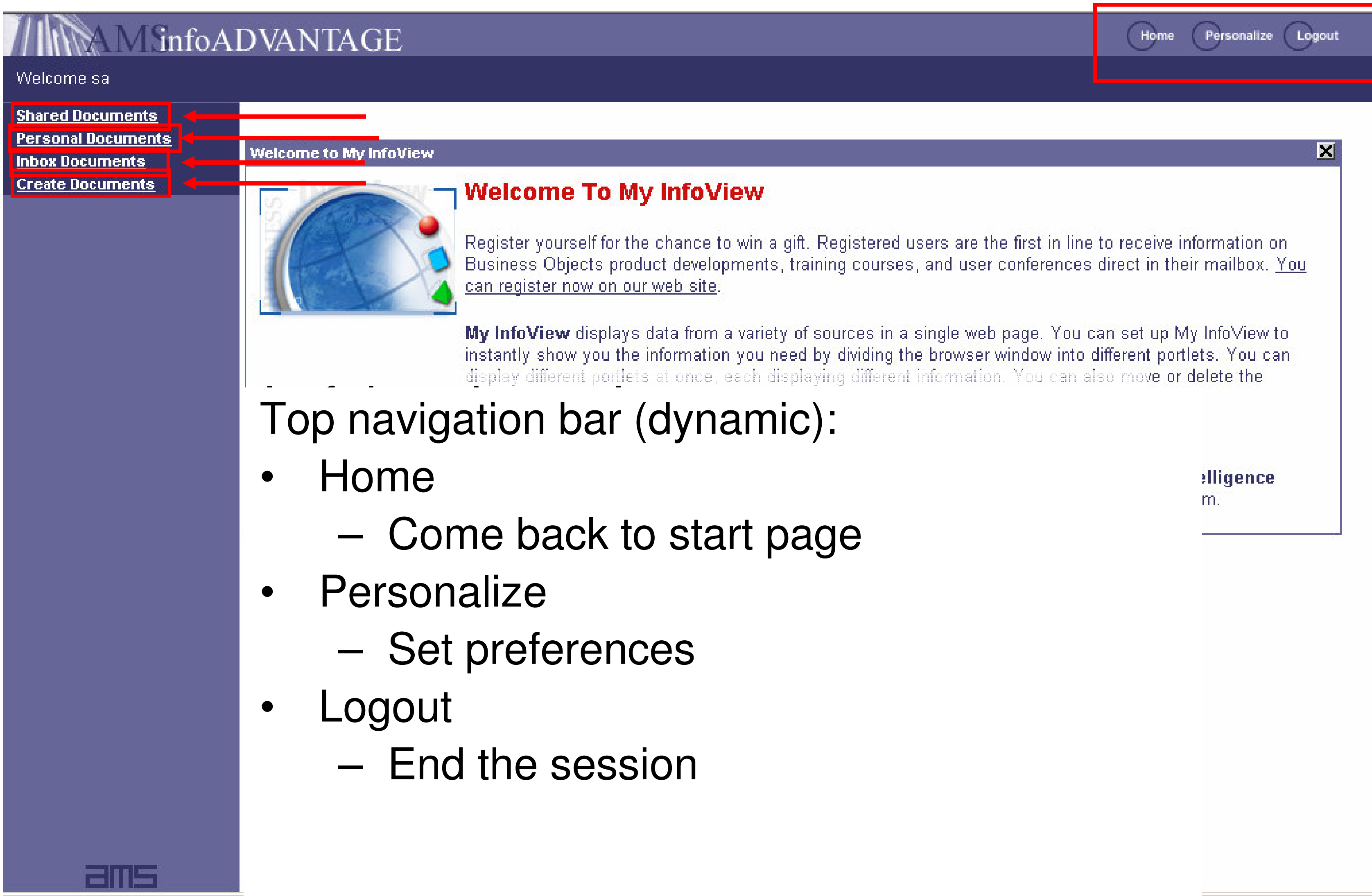
d) Advanced functionality

a) Basic Navigation

Use different pages in AMS infoAdvantage

- Welcome
- Personalize *info*Advantage
- Different areas to store/retrieve documents
  - Shared documents
    - Available to all users
  - Personal and Inbox documents
    - User specific
  - Create Documents
    - Opens infoAdvantage editor

WebI - Welcome Page



Top navigation bar (dynamic):

- Home
  - Come back to start page
- Personalize
  - Set preferences
- Logout
  - End the session

Personalize

- Display:
  - Personalize Home Page (myInfoView)
    - Add web pages to welcome page
    - Show folders/documents when logging in
- List:
  - Set refresh options
    - Once per session
    - Every time list is accessed
- View:
  - Set view options (PDF/HTML etc)
- Edit/Create:
  - Use HTML or JAVA panel (we use JAVA)

JB9

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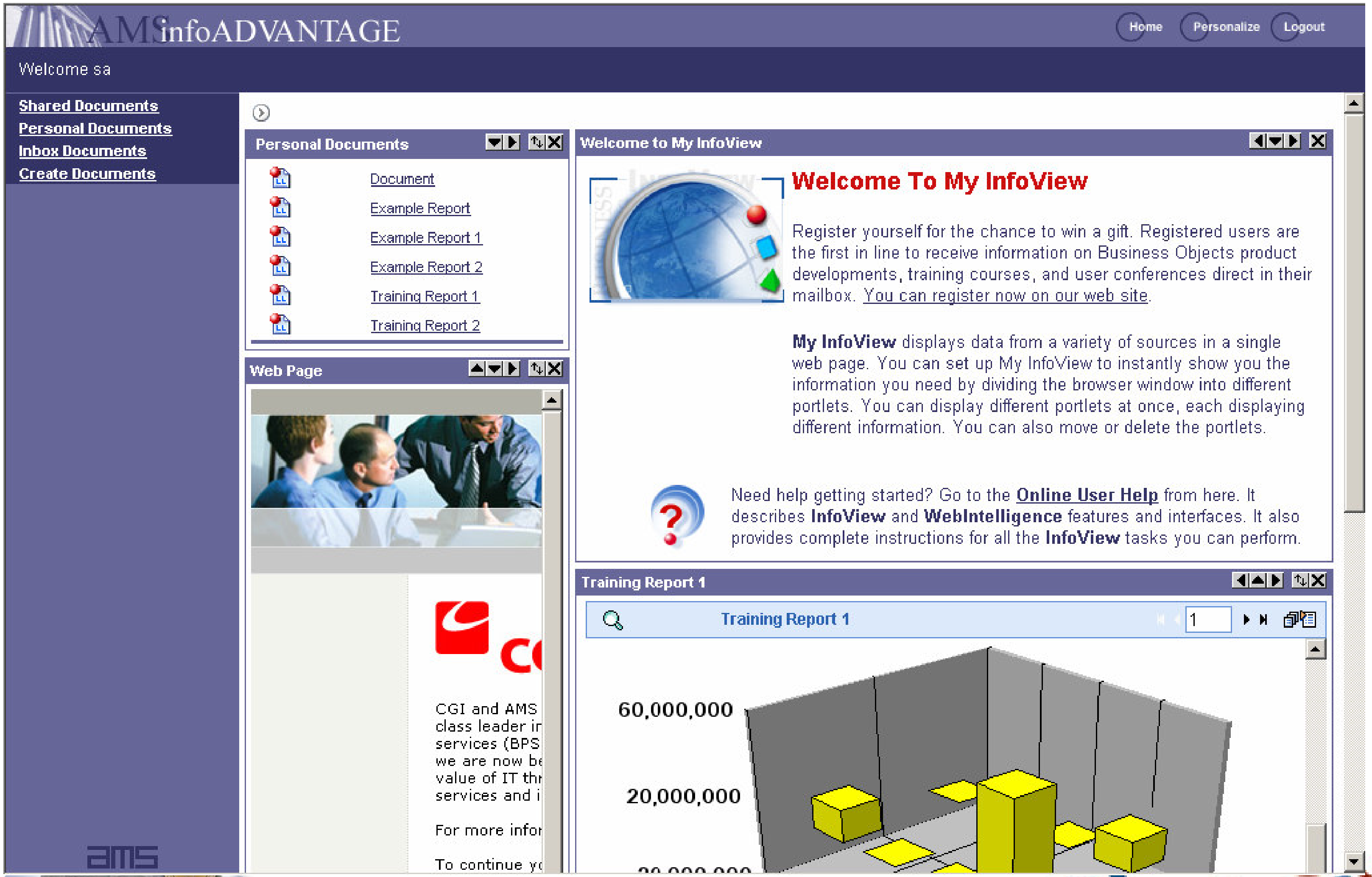
Slide 11

JB9 Any reason why we use Java?

JB, 11/16/2004

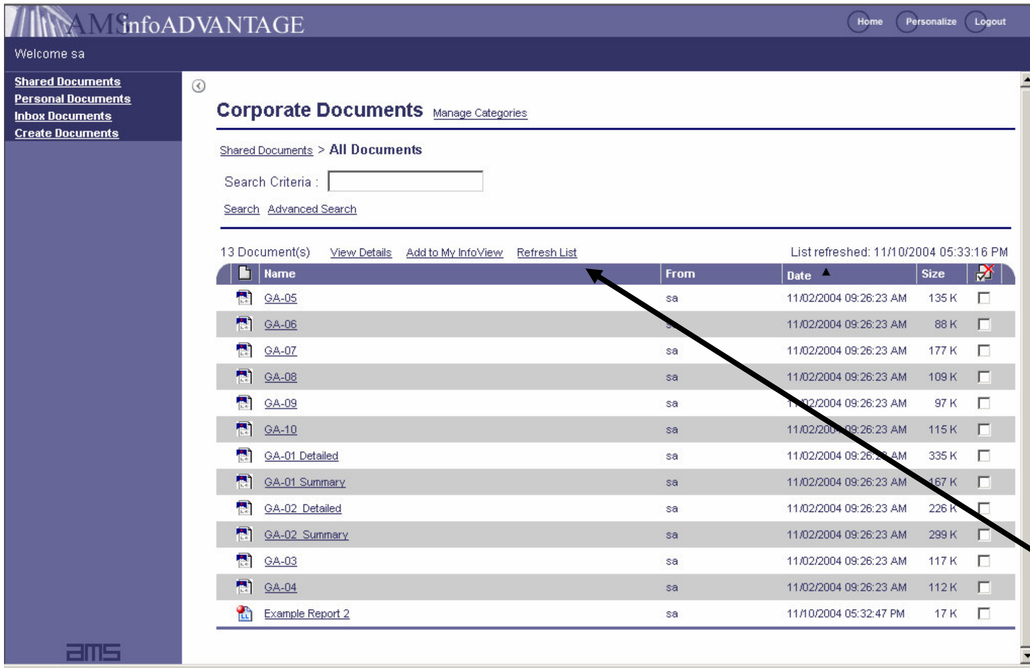
Personalized Page



Shared, Personal, Inbox – Common features

- This where the reports are accessed
- Manage categories
  - Display reports per category
- Search for Documents
- View Details
- Add to myInfoView
- Refresh List
  - Get the latest version of documents
  - **REMEMBER THIS ONE !!**

Shared Documents – Page view



View
- Document Type
- Report Name
- Published by / on
- Size

Delete Reports

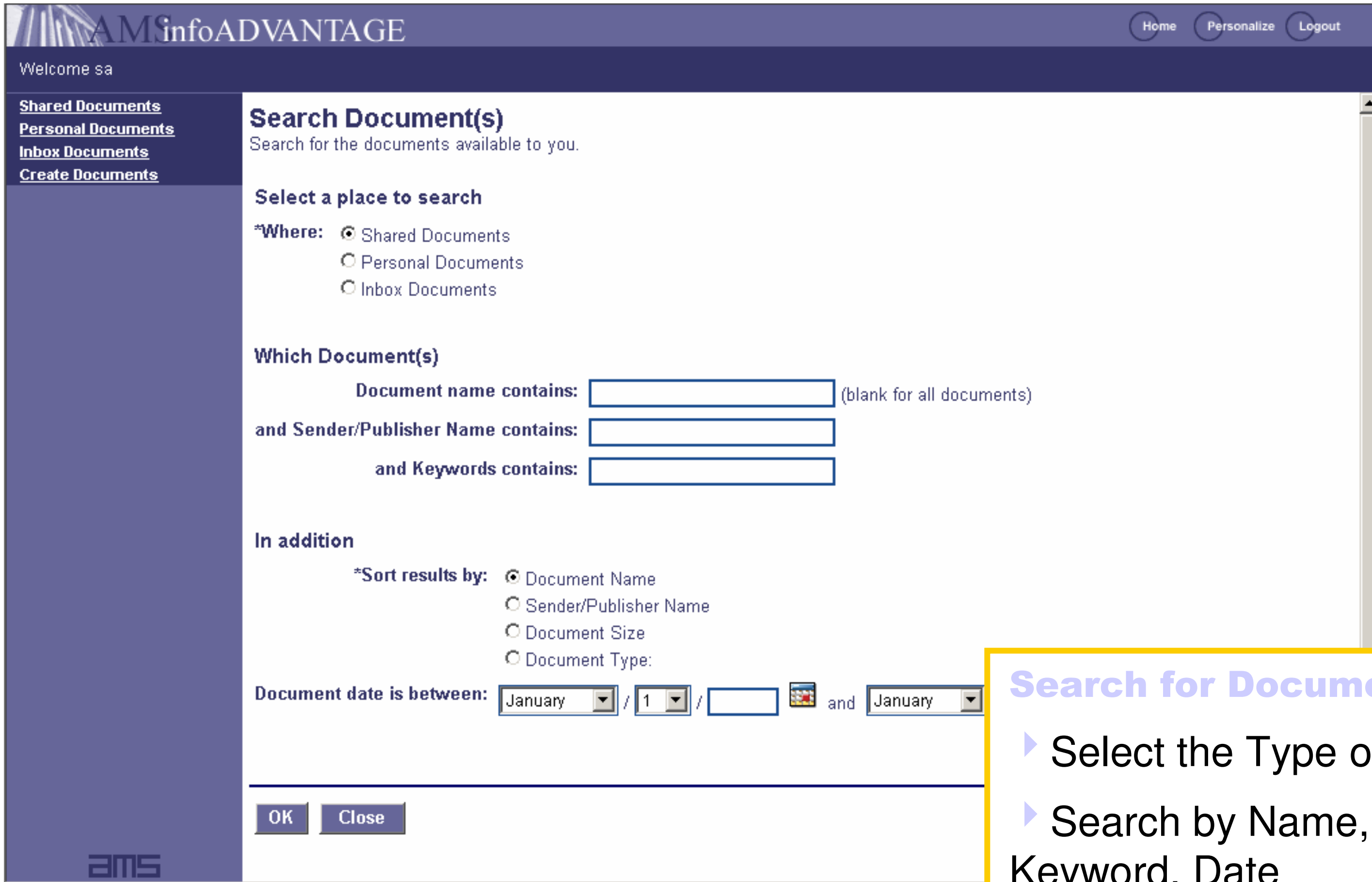
Refresh List

View Details:
- Info for document
- Document Level Navigation

Thick Client Report

Thin Client Report

Search for Documents



Search for Documents

- Select the Type of Document
- Search by Name, Author, Keyword, Date
- Order the Search by Document Name, Author, Size, Type

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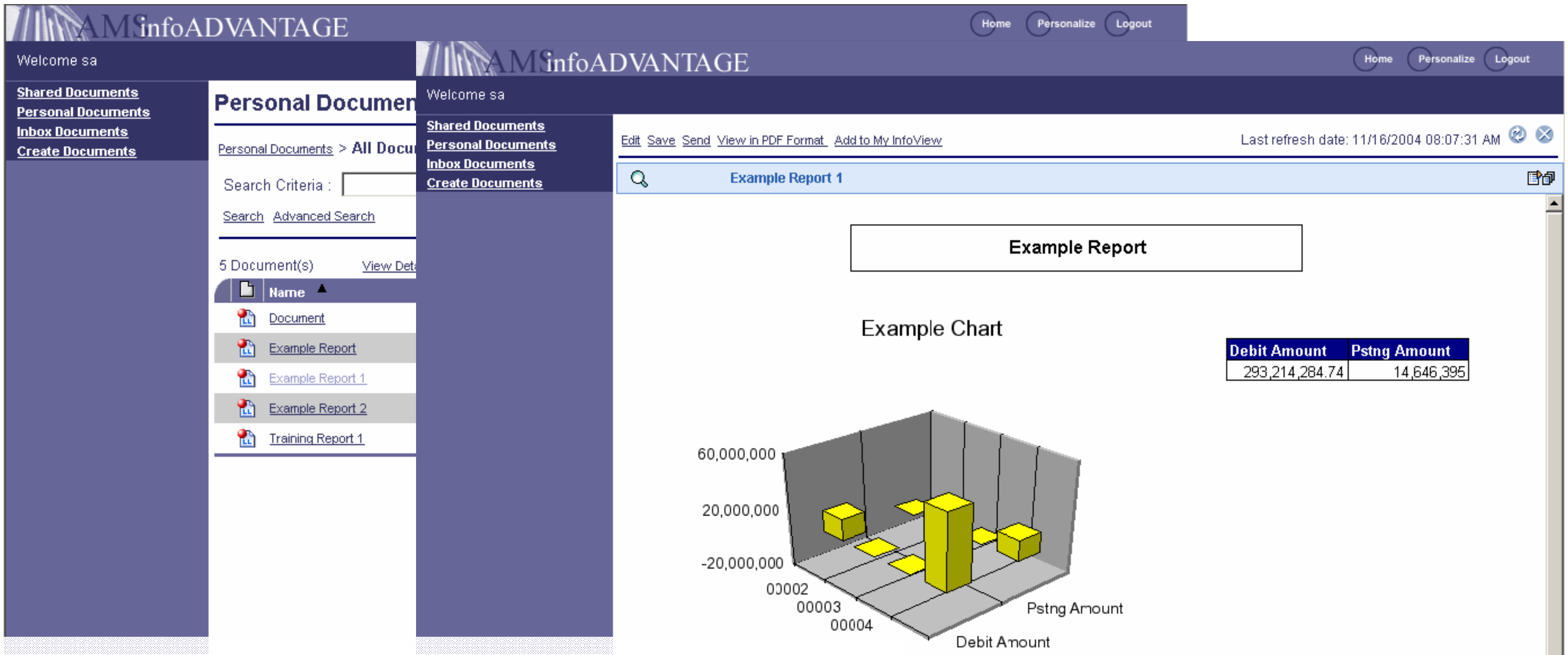
Retrieve a Document



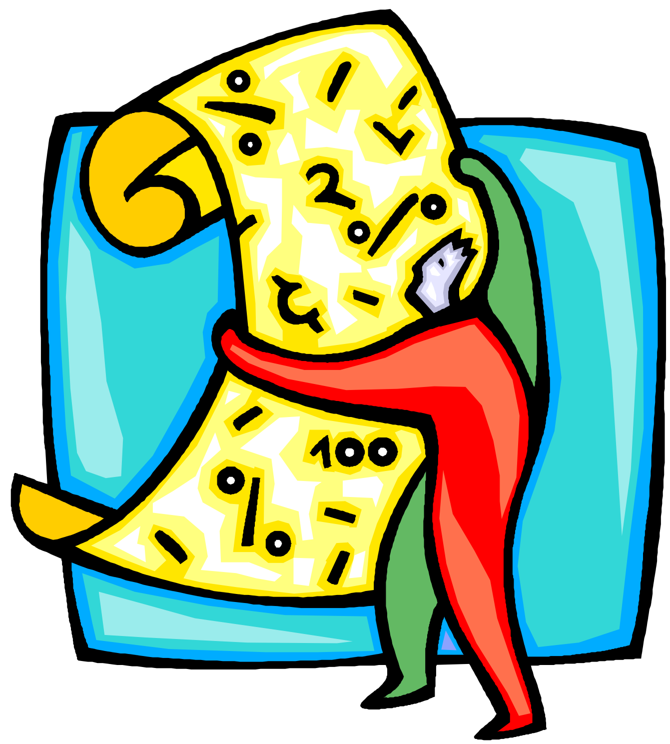
- Find the document you need
- Double click on the document and it will open

Demo 1: Navigation

- Login
- View pages:
  - Corporate
  - Personal
  - Inbox
- Search for documents
- Open Document
- Set user options
- Logout

b) Work with standard or existing reports

- Retrieve a document
- Refresh to get latest (or wanted) data
- Save a document
- Download a document



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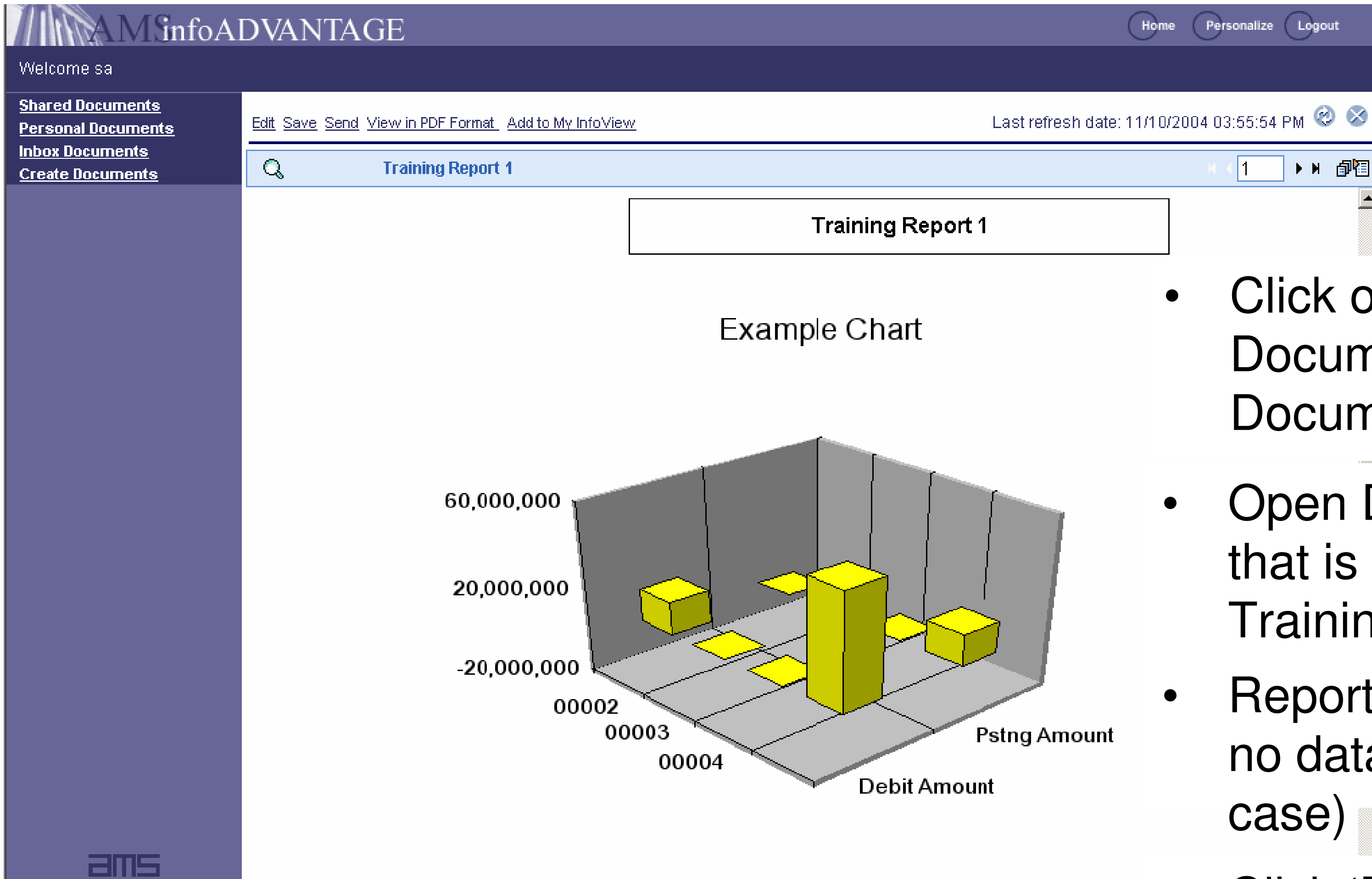
Retrieve and Refresh Reports



- Click on 'Personal Documents' -> All Documents
- Open Document that is needed -> Training Report 1
- Report opens, but no data (in this case)
- Click 'Refresh' data is retrieved

Save or Download a report

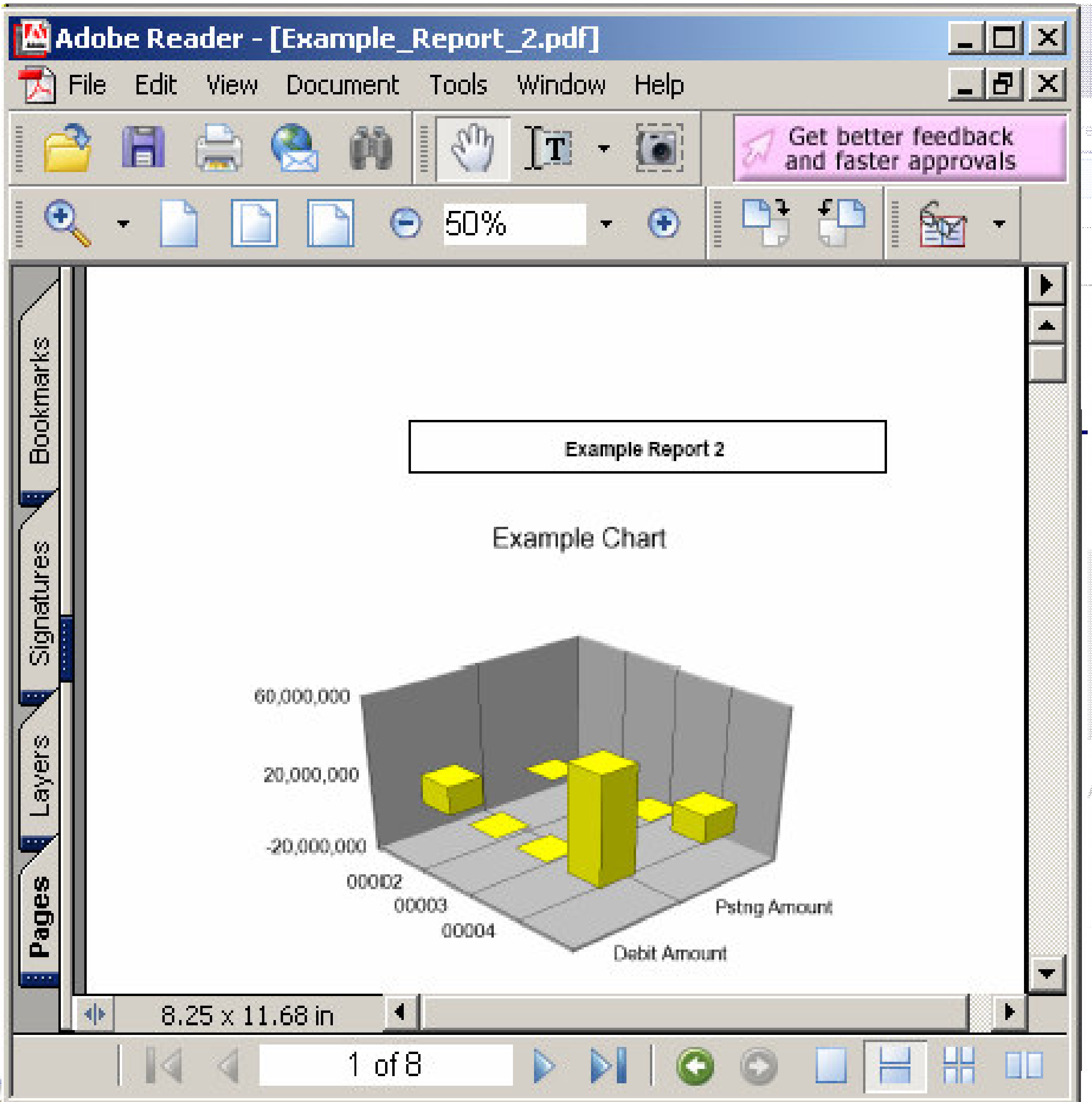
Save a document

- Keep report to use later
- Share report with other users
  - Shared Documents
  - Send directly to specific users

Download Document:

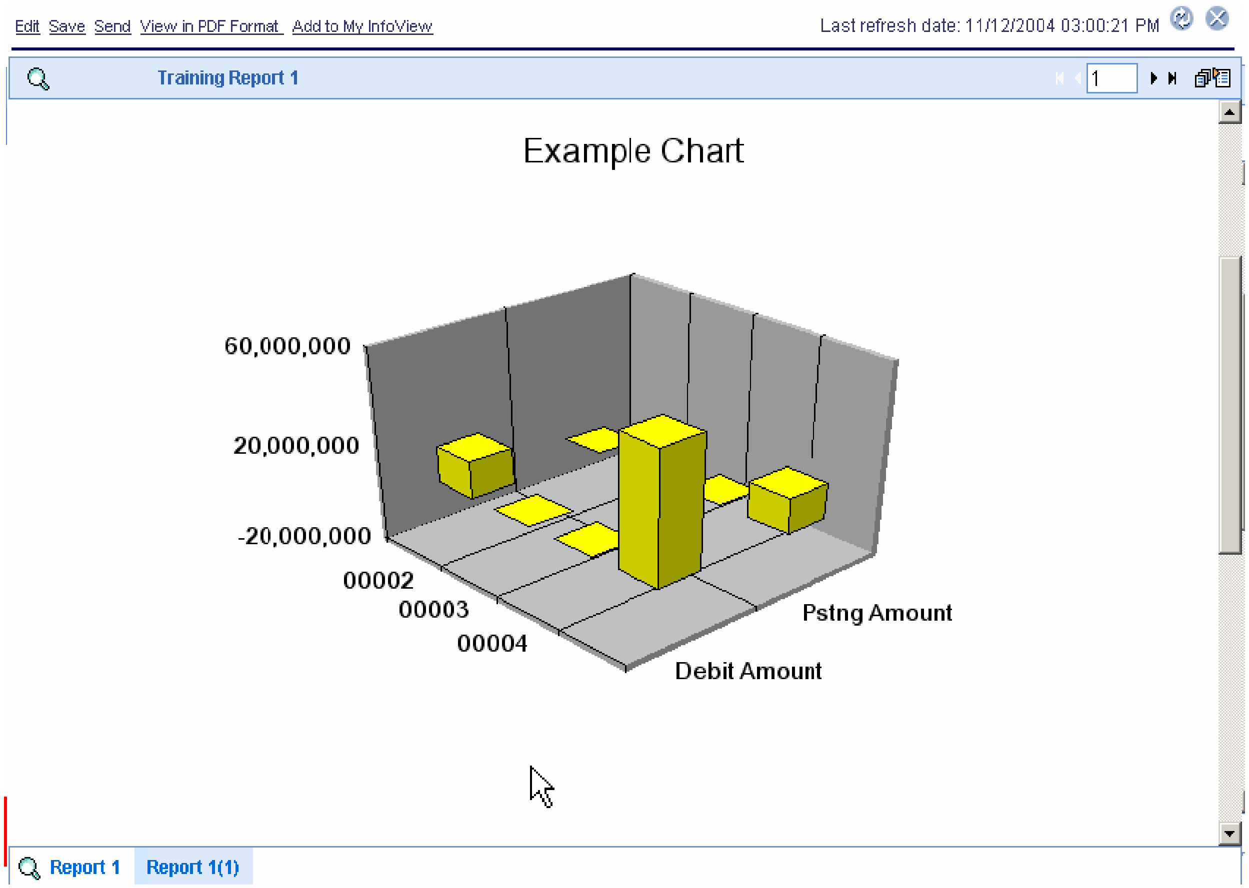
- Both Thick and Thin client reports
- Locally or on Server:
  - PDF (Keeps existing formatting)
  - Excel (Keeps existing formatting)
  - Csv (Raw Data)

Save and Download a report



1. Open Report
2. Click on 'Save'
3. Save as Shared or Personal file in repository or
4. Download: Select format (e.g. PDF)
5. Click on Icon to save to computer
6. Open saved file

Drill down – Thin Client report



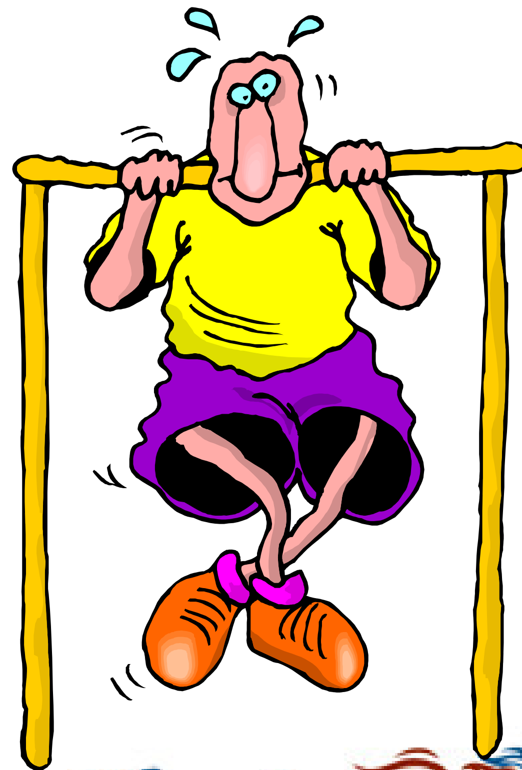
- Click [icon] to start drill
- Click [icon] to create snapshot
- (Back to main tab)
- Click on [icon] to select fields
- Select values from dropdown
- Report refresh with only value selected
- Snapshot still available

Demo 2: Save/Download reports

- Open a report
- Refresh to get latest data
- Save report as PDF
- Save report as EXCEL spreadsheet
- Open outside of Business Objects

Exercise / Workshop 1

- Login to infoAdvantage
- Open a report from ‘Shared Documents’
- Refresh data
- Save as PDF
- Save as Excel spreadsheet
- Open outside of infoAdvantage



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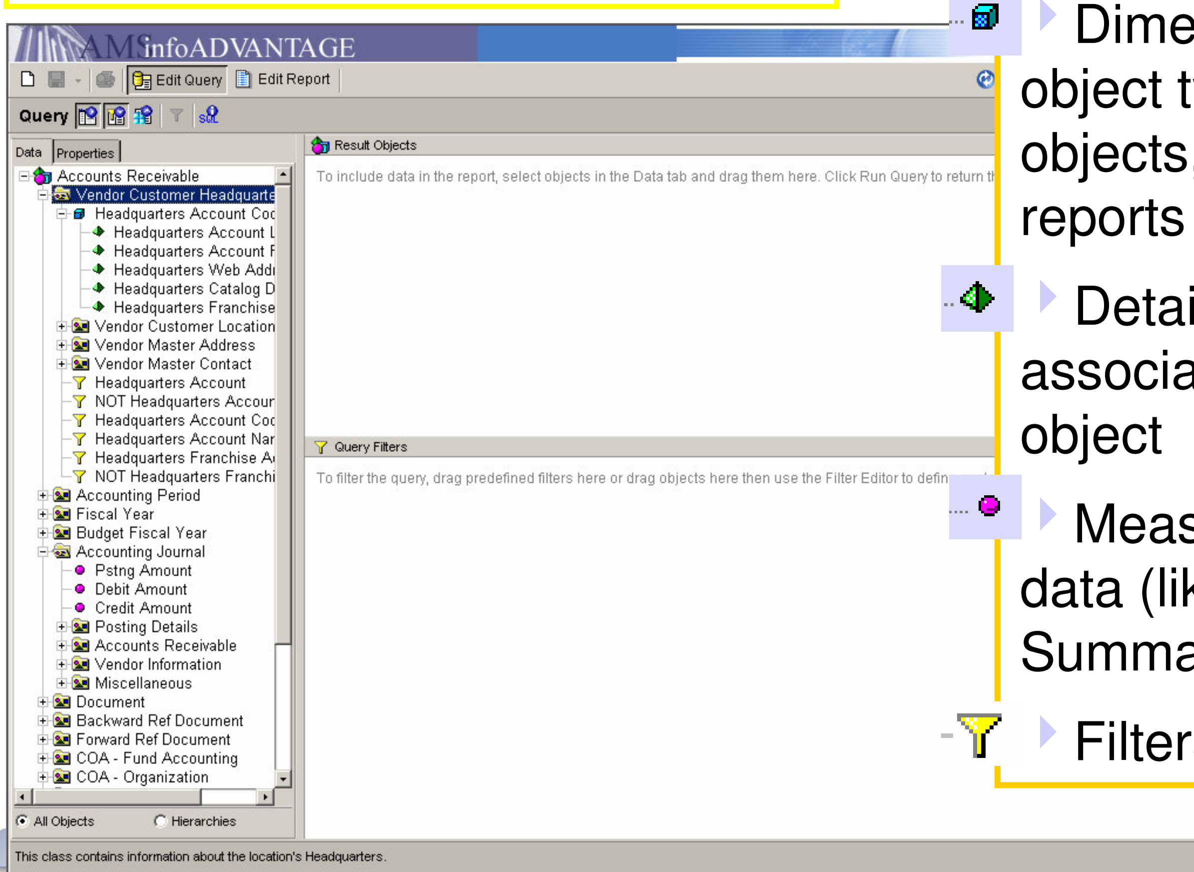
c) Create/Modify Reports

- Terminology:
  - Universe, Class, Object, Document, Query
- How to create a report:
  - Select Universe
  - Query View
    - Change the information that will be returned
      - Result fields
      - Filters/Conditions
  - Report View
    - Change report lay out
      - Filter displayed data
      - Add tables/charts/etc
  - Query View:
    - Toolbars

Universe, Class, Object

Universe shows db fields related to certain functional area.
Example: Accounts Receivable

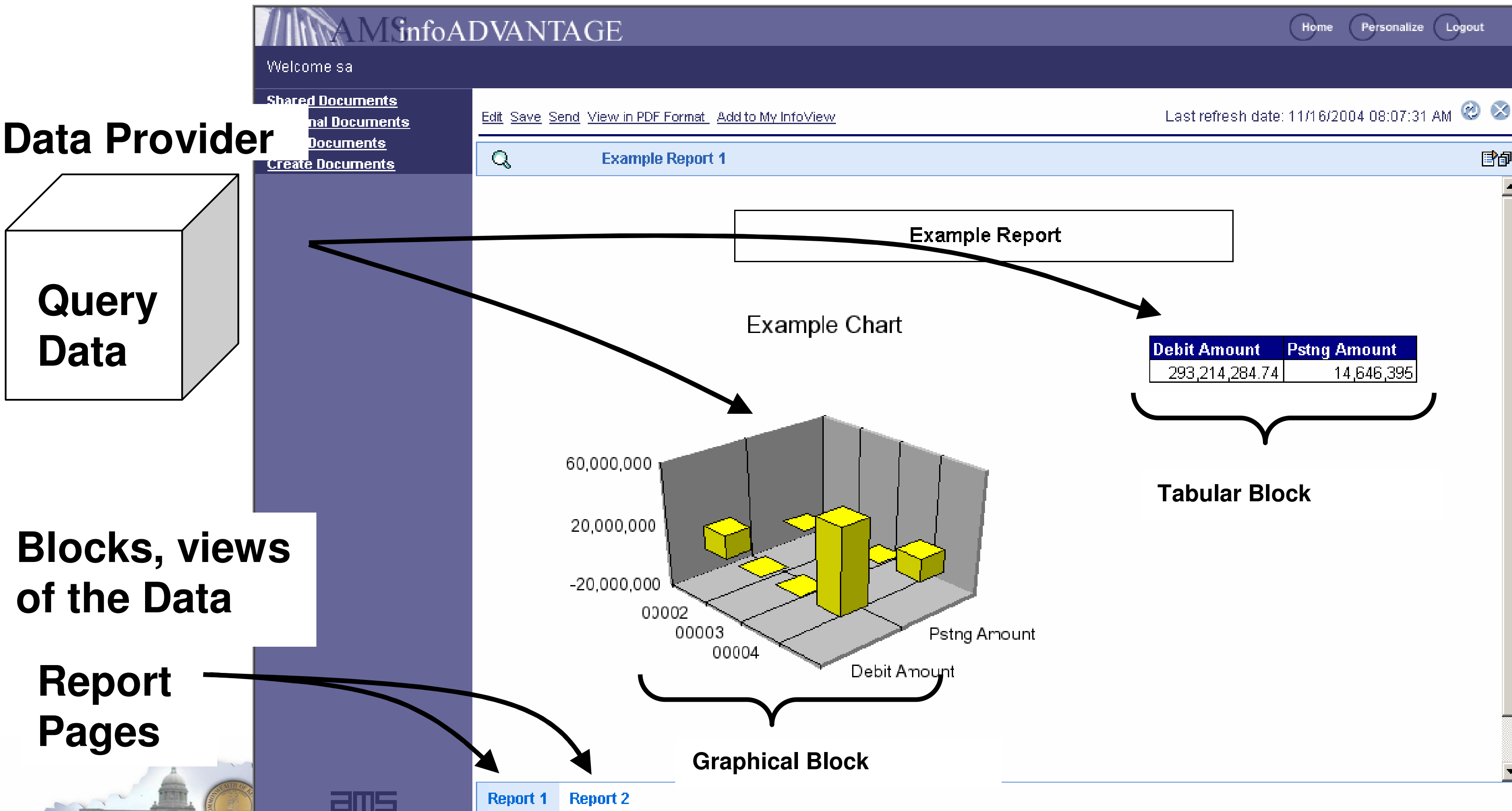


Report Objects

- Class. Contains logical groups of related objects
- Dimension object. Default object type, typically key objects, and are objects that reports will be based on
- Detail object. Always associated with a dimension object
- Measure object. Numeric data (like amounts). Summarized by default
- Filters: special kind of object

Document

Document consists of 3 main parts:



A query

- Defines the statement that will be executed against the database to return data
- Consists of:
  - Results fields
    - To be displayed in the report
  - Filters or conditions
    - To restrict data that will be returned

Filters

- Custom filters
  - Created for specific report
- Predefined filters (Quick Filters)
  - Filters defined at universe level
  - Can be used in more reports/documents
- Filter options:
  - Prompts
  - Equal to, Different from, In List etc
  - Advanced filter (subquery)

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Create a Report – Step by Step

- Login to *info*Advantage
- Click on ‘Create reports’ link
  - List with available universes will be displayed
  - Select correct universe (based on functional area report applies to)
- Query panel will open
  - Separate window
  - This allows user to start selecting fields/applying conditions etc

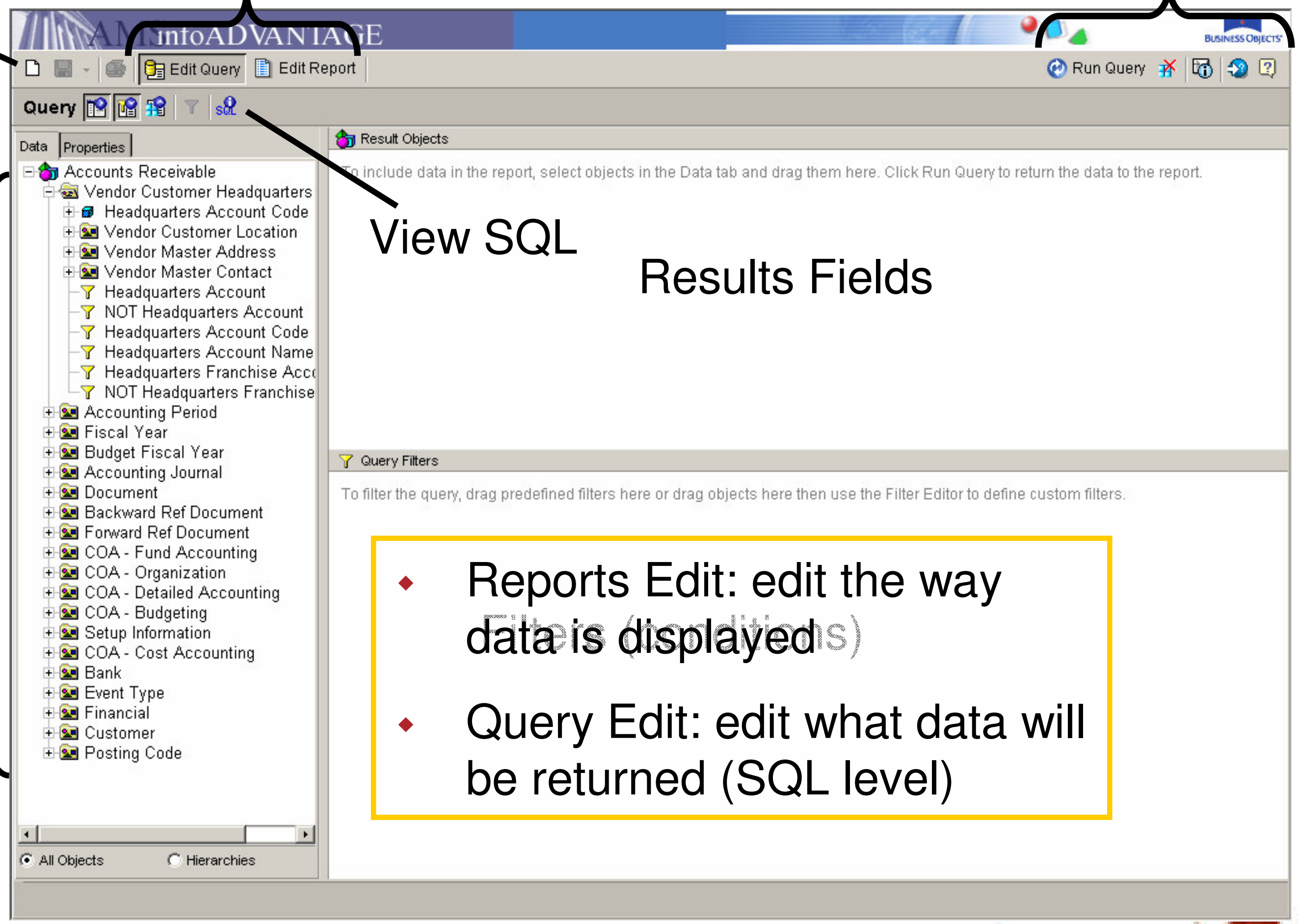
Query Panel

New doc and save

Report edit or query edit

Run query, purge data, help

Objects & Classes



View SQL

Results Fields

- Reports Edit: edit the way data is displayed
- Query Edit: edit what data will be returned (SQL level)

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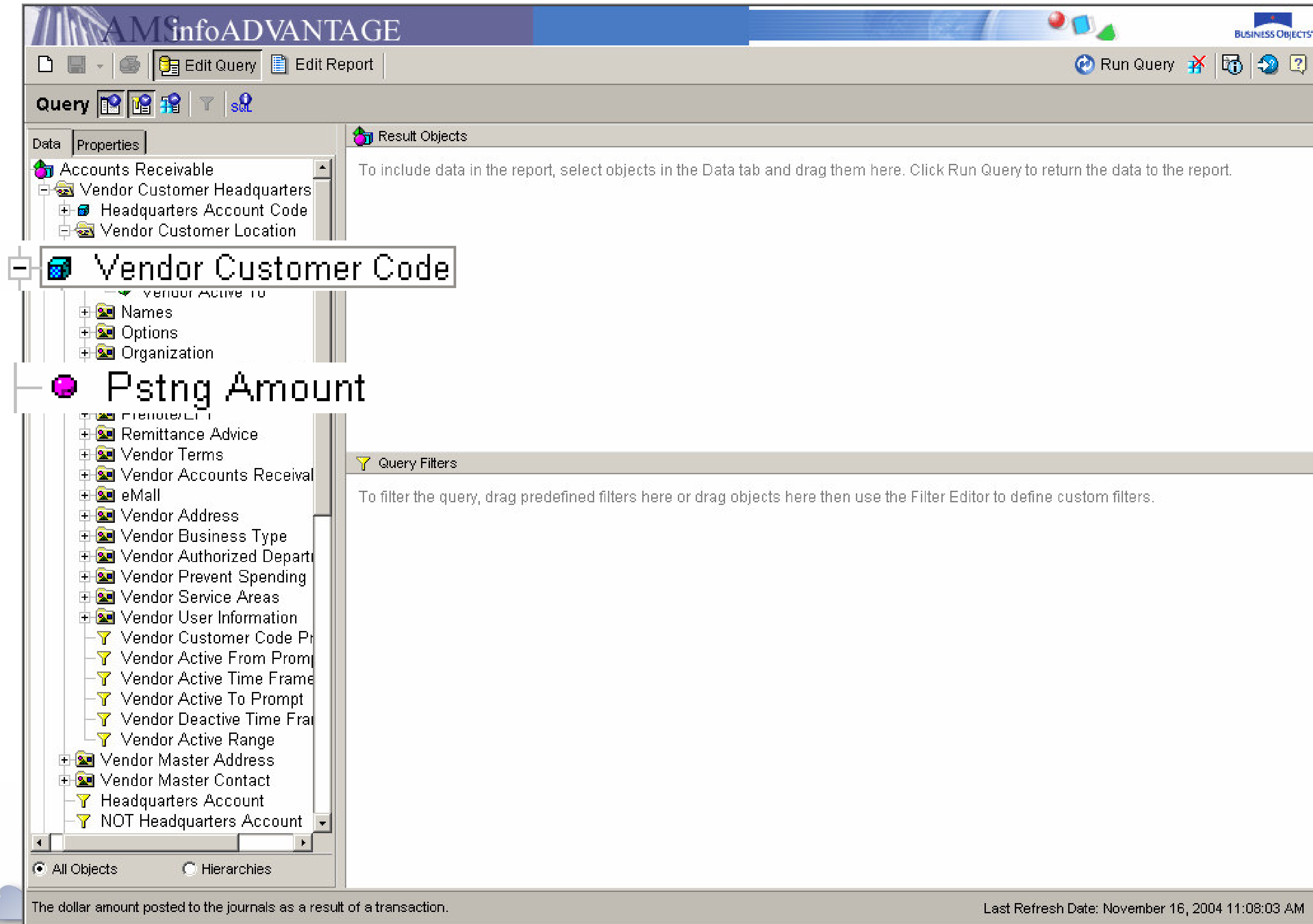
Build the query - 1

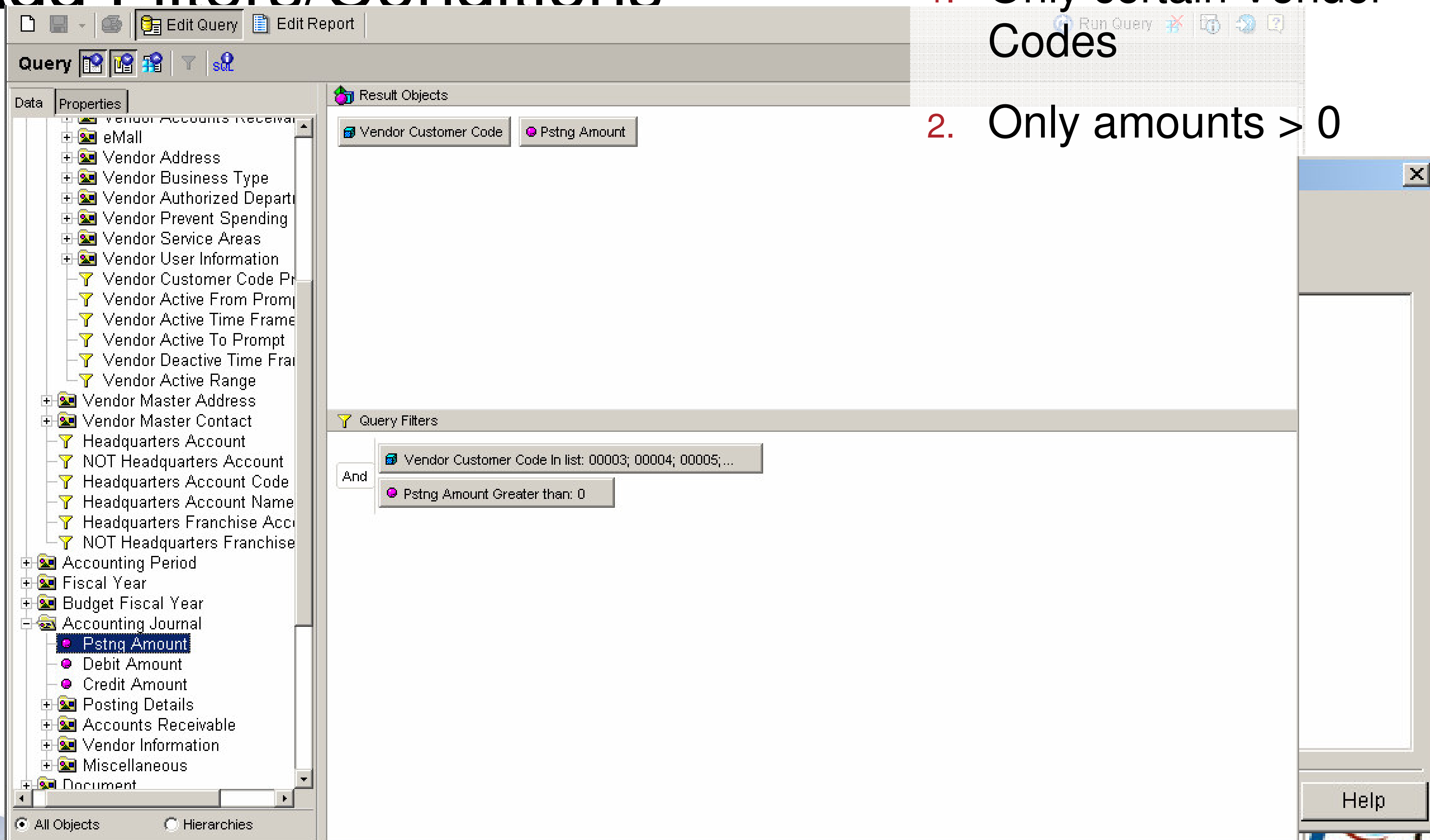
Add results fields: ‘Double click’ or ‘Drag and Drop’



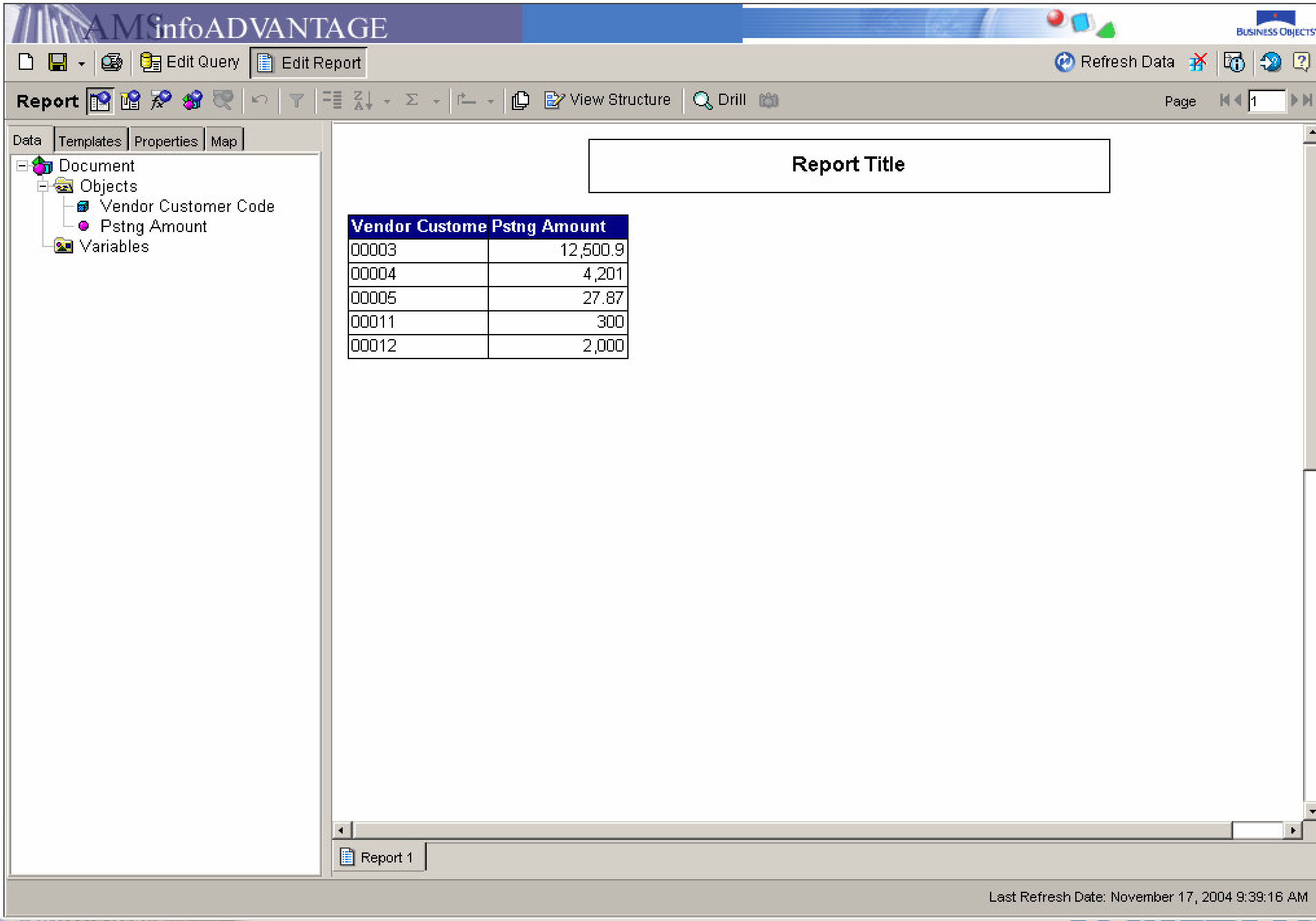
Build the Query – 2

Add Filters/Conditions

1. Only certain Vendor Codes
2. Only amounts > 0



Run the Query



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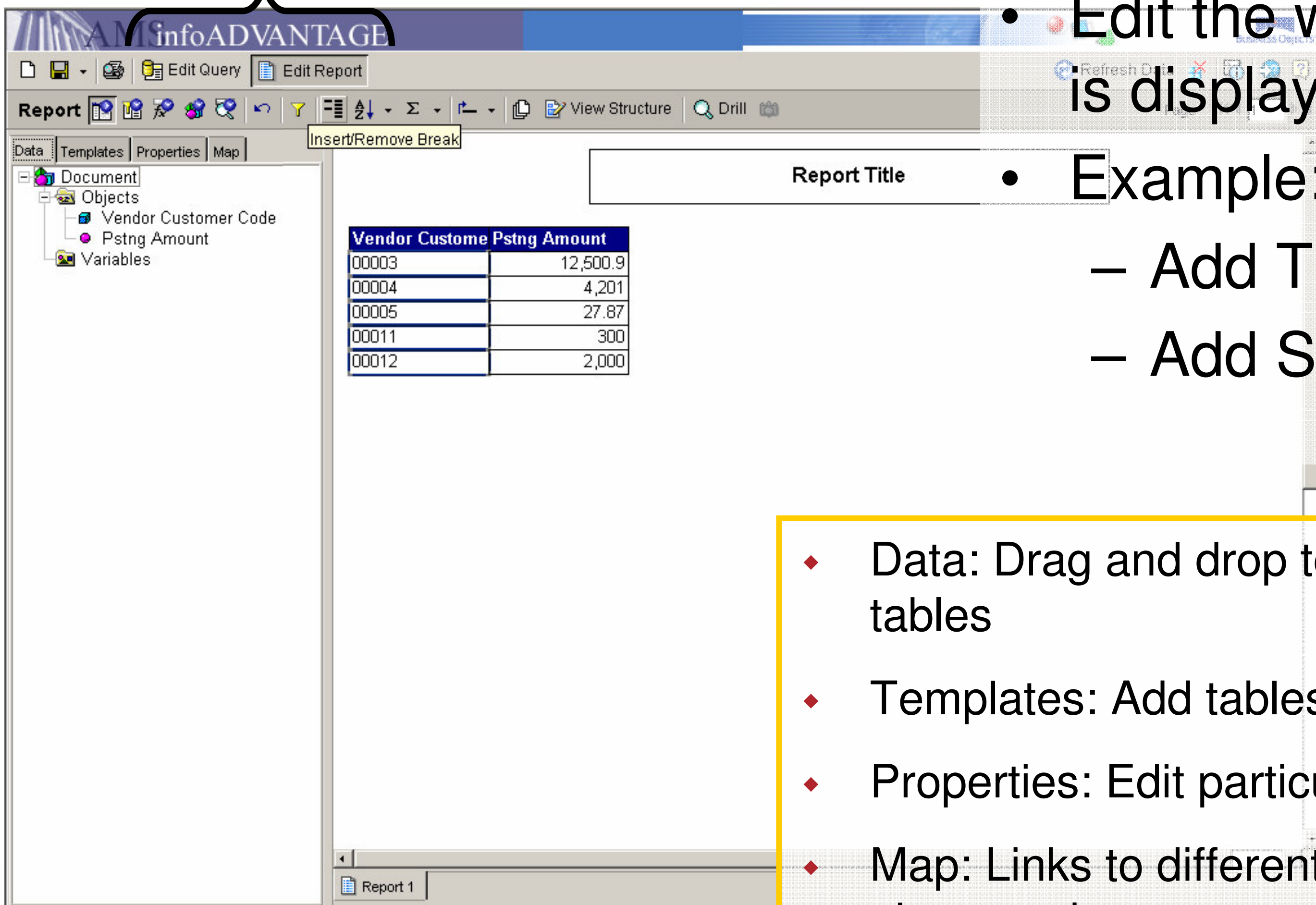
Edit Report

- Data returned is good, display is not so great
- WebIntelligence allows you to
  - Apply Breaks
  - Create Title Cell
  - Add calculation
    - summation/average/etc
  - Convert data into chart, additional table

Edit Report

Edit Report, Not Query



- Edit the way the data is displayed.
- Example:
  - Add Title
  - Add Summation

- Data: Drag and drop to create new tables
- Templates: Add tables/charts/cells
- Properties: Edit particular table/cell
- Map: Links to different reports and elements in report

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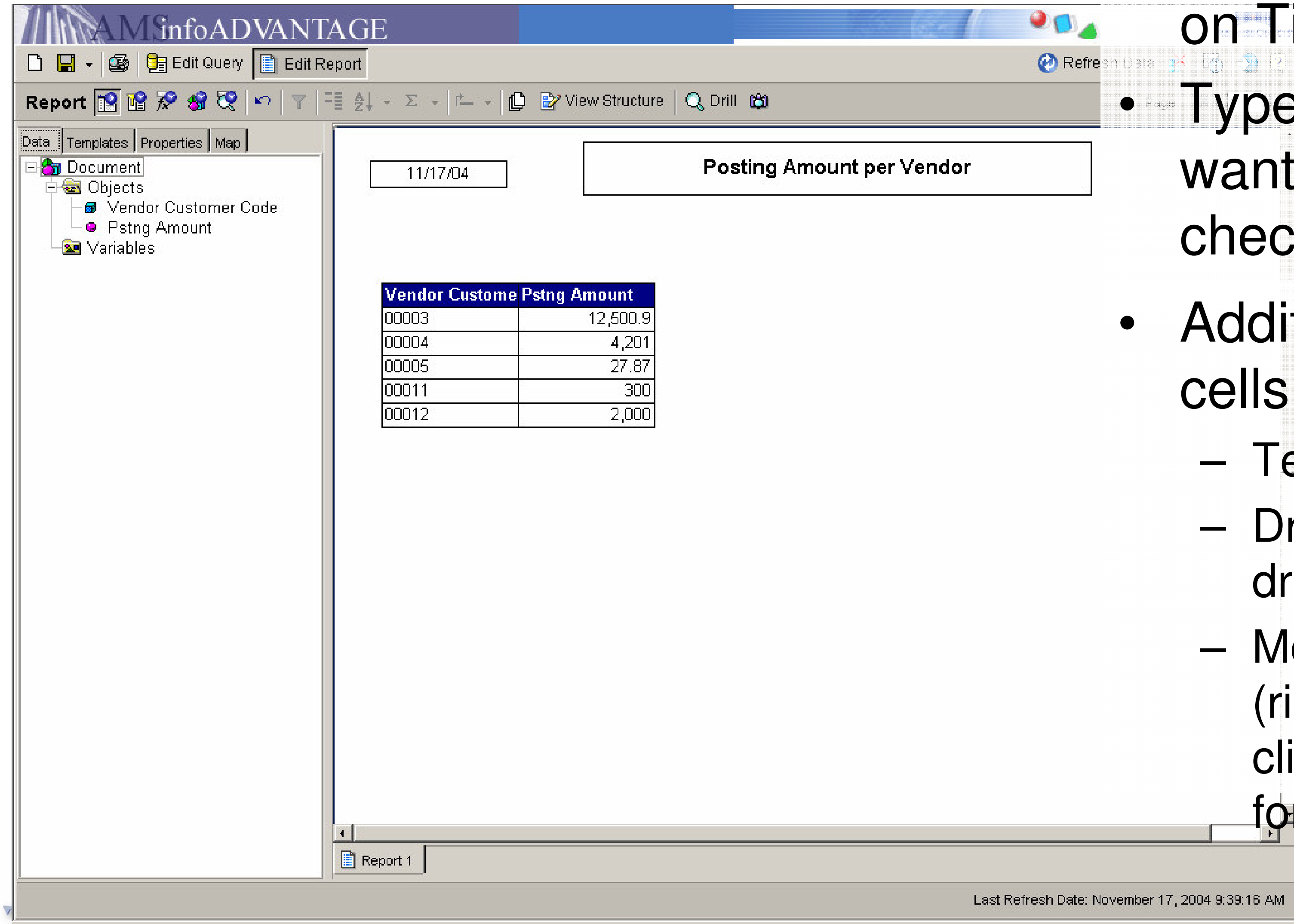
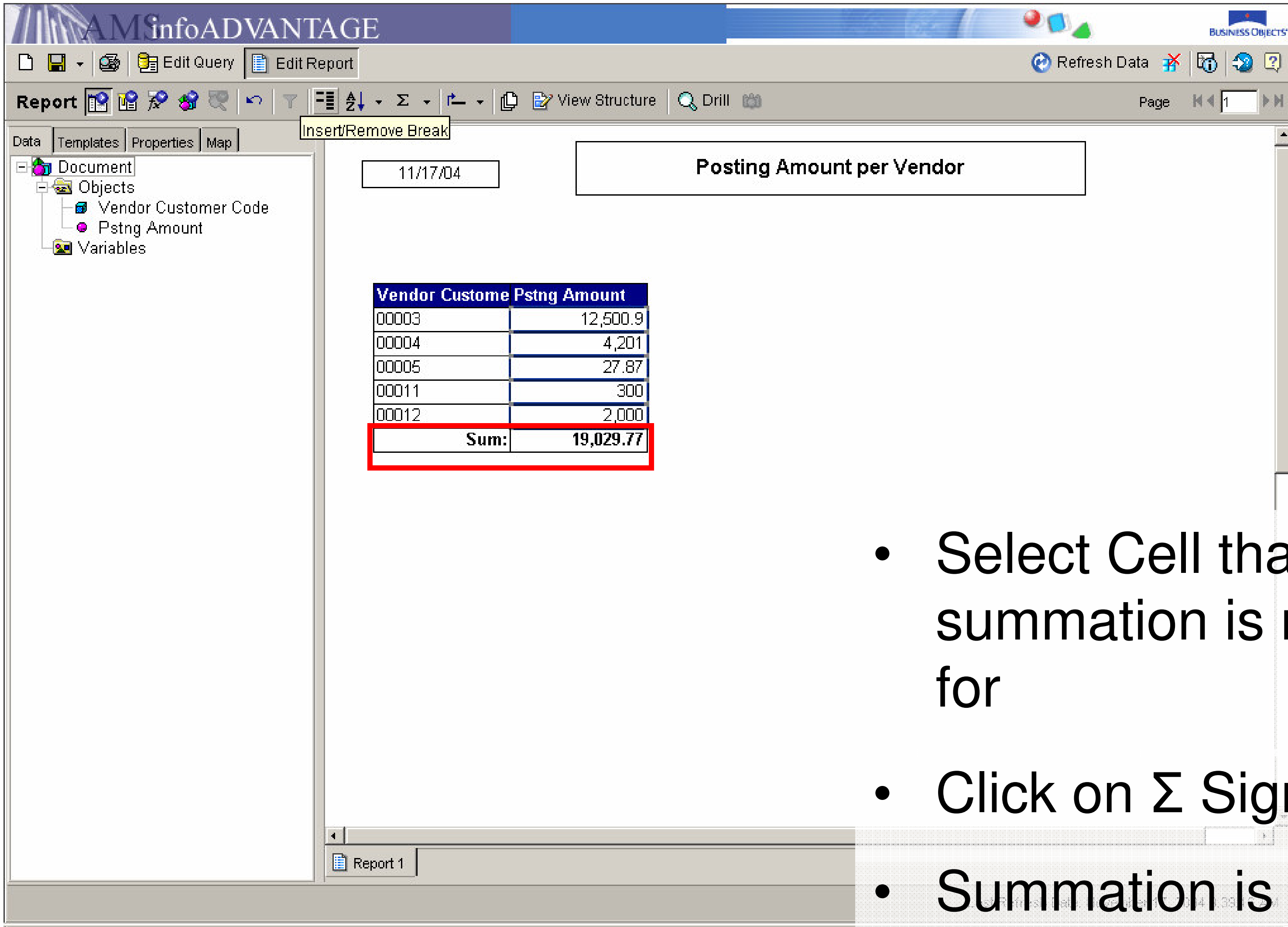
Edit Report – Add Title



- Double click on Title Cell
- Type Title wanted, check formula
- Additional cells:
  - Templates
  - Drag and drop cell
  - Modify lay out (right mouse click) or formula

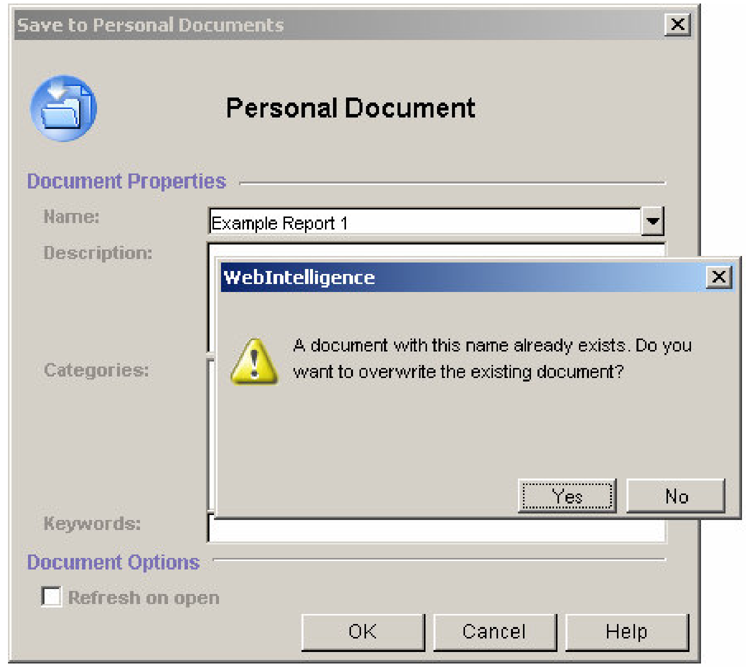
Edit Report – Add Summation



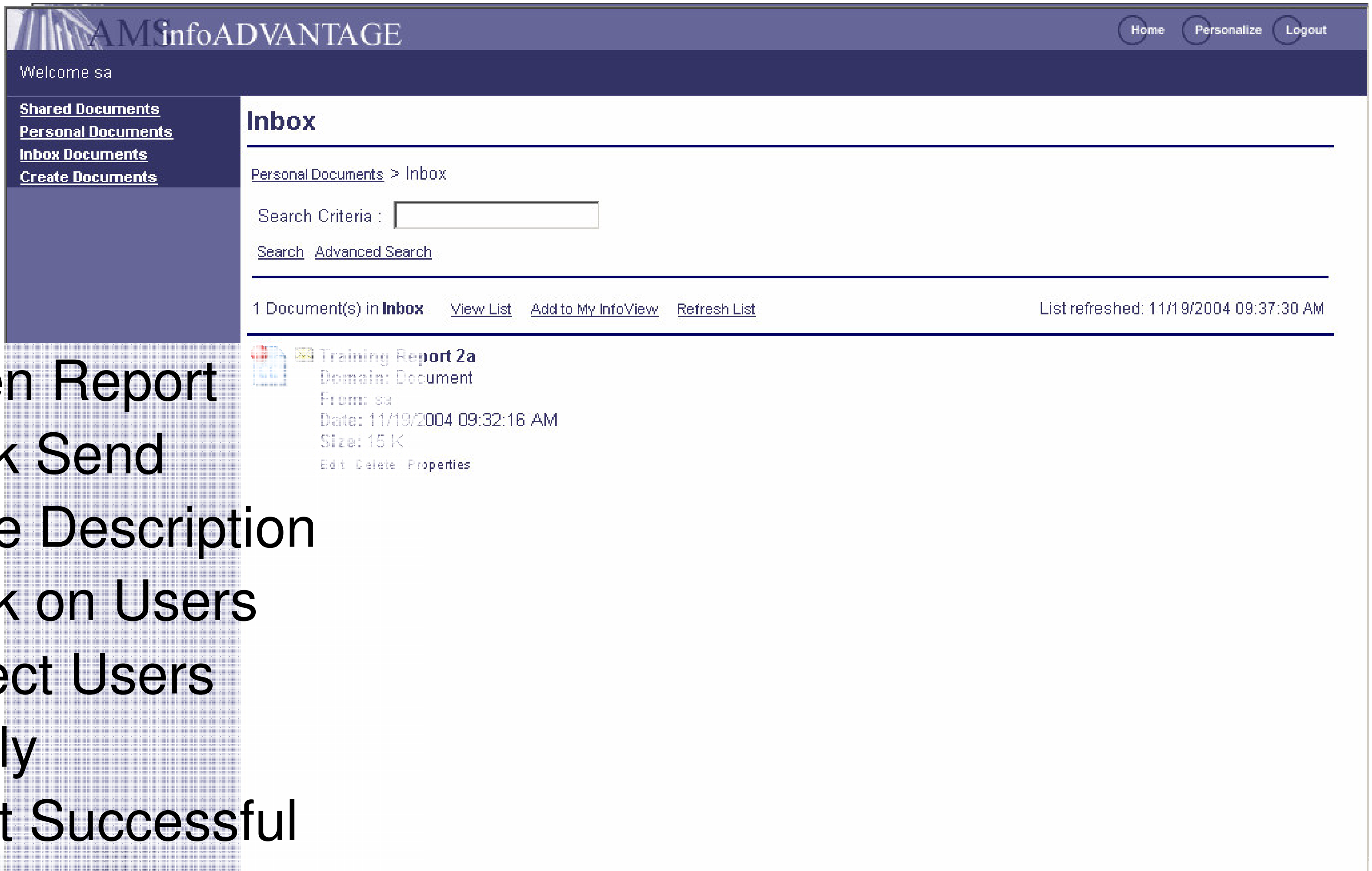
- Select Cell that summation is needed for
- Click on Σ Sign
- Summation is added

Save Report

- Different options to save a report:
  - With or without data
  - In repository:
    - Shared
    - Personal
  - On users computer
    - Excel spreadsheet
    - PDF
- When saving to repository: user will be prompted if document with same name already exists
- To Print: export as PDF then print



Send Report to other users



- Open Report
- Click Send
- Type Description
- Click on Users
- Select Users
- Apply
- Sent Successful
- Shows up in Inbox

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Demo 3: Create a report

- Login
- Create Report
  - Select fields to be displayed
  - Create conditions
  - Run Query
- Save Report
- Add Summation and Title
- Save Again
- Logout

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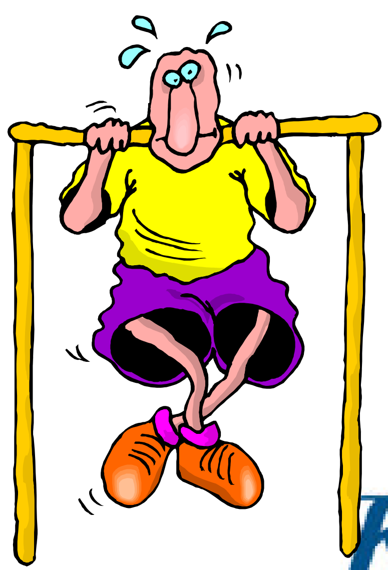
Exercise / Workshop 2

- Create a new report
  - Use Accounts Receivable universe
  - Select following fields:
    - Headquarters account code
    - Debit amount
    - Run query
- Add filters to restrict data
  - Example: only Debit amounts between 0 and 10,000 dollar
- Change lay out
  - Modify title
  - Add summation
- Save report
- Send report to other user. Verify that it was received



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Questions